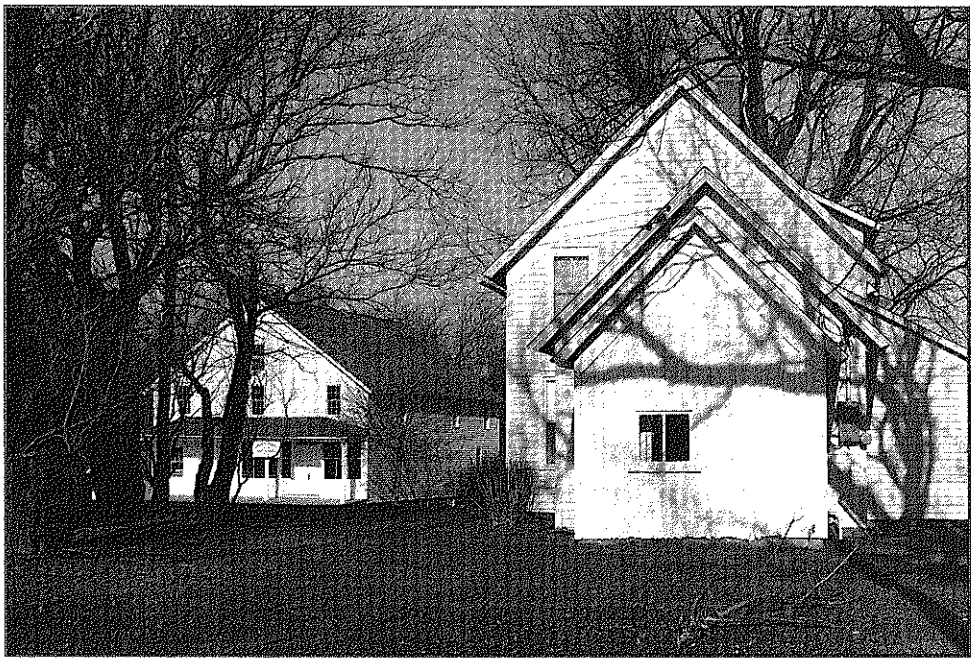
Chapter Two
SURVEY PLANNING



Huron City

Most surveys are initiated by communities in response to specific issues or circumstances. While one or two people may come up with the idea for a survey, planning for one should become a group activity that involves the various constituencies within the community that may be affected by or interested in the project and its results. In fact, survey planning should involve as broad a range of appropriate experts and interested parties as the community can muster. A planning committee should be established that includes people other than those who want to work directly on the project. It should also include:

- representatives of community organizations that can be helpful *or* that will need to be brought on board to ensure that the results will be accepted by the community;
- local historians and representatives from any local historical society, historical commission, or historic district commission;
- faculty of nearby educational institutions with expertise in academic disciplines appropriate to the project and types of historic resources thought to be present;
- representatives of the executive and legislative branches of the local government;
- members of the community's or county's planning staff (planning and economic development staff may have valuable experience in crafting language for the plan and in preparing a request for proposals); and
- members of the local board of realtors, chamber of commerce, and economic development corporation.

Planning also may involve a preliminary stage of garnering community support. Fundamental to the initiation of a survey is an understanding among the community's planners and others of the value of an above-ground survey.

Planning a survey requires decisions on where the survey should begin, what is to be surveyed, who should do the work, how the survey should be publicized, and how the work will be reviewed. Each community's reasons for conducting a survey are unique, and each survey should be developed to meet the needs of the community, while following the basic guidelines outlined in this manual.

THE SURVEY PLAN

A survey project should always begin with development of a formal, written plan for the project. This should clearly define why the survey is being undertaken and identify concrete goals to be accomplished. The survey plan may include short- or long-term goals or a combination of both. A clear definition of goals is key to the success of the project because it will help determine the survey design — where survey activities will take place, what will be surveyed, what level of research will be performed, who will do the work, and how the community will be notified of the project and kept informed of its progress. The explanation of survey goals should include a description of the activities, programs, and priorities that survey sponsors want to influence or implement when the survey is completed. The plan should also include a description of the survey area, the types of properties that will be included in the survey, the level of research and documentation that will be required, who will do the work, and the time frame. For large areas where the budget is limited, any plans for phasing the survey over time should be identified. Priorities for accomplishing the various survey phases should be recommended in the plan. Persons charged with developing the plan for a survey should review the Standards for Identification and Evaluation in the *Secretary of the Interior's Standards for Archaeology and Historic Preservation* (36 CFR 61). The *Standards* are available from the SHPO.

WHERE TO SURVEY: DETERMINING BOUNDARIES

Parameters to be considered in selecting survey area boundaries should echo the evolutionary history of the area to be surveyed and reflect the project's short- and long-term goals and the funding available. Survey boundaries typically encompass:

- An entire city, village, or township from border to border;

- A community's historic core, the central area containing the great majority of properties forty and more years old;
- One or more specific neighborhoods or areas, such as the central business district or an old residential neighborhood; or
- Areas already defined for national register or local district designation.

Survey boundaries need to be carefully defined so they are large enough to include all properties that appear to relate historically to the area being surveyed. Survey boundaries should never just coincide with modern boundaries that have little or no bearing on historic development. For example, surveys should not be based on the boundaries of neighborhood associations or on HUD boundaries, such as Neighborhood Strategy Areas. For surveys covering areas outlined by non-historic boundaries, the survey area should be expanded beyond the initial area to at least encompass the rest of the historically related area as best as can be determined. This procedure helps to ensure that later surveys in adjoining areas do not abridge the usefulness of, or even invalidate, the results of the originally proposed survey work conducted within the area defined by non-historic boundaries.

Survey boundaries should also not be overly fragmented. Surveying a series of small, discontiguous areas should be avoided. Such surveys are inefficient, and they pose evaluation problems because, inevitably, a wider context is needed for accurate evaluations of significance. Instead, broad areas based on historic parameters should be selected for survey boundaries.

Survey boundaries should also be large enough to encompass all of the properties that need to be surveyed to accomplish project goals. For example, to facilitate the eventual definition of historic district boundaries, a survey of a central business district should include blocks at the edges that may contain only a few older commercial buildings so that it can be certain that all the buildings that should ultimately be in the district have been considered. The survey of a highway corridor passing through an agricultural area should encompass entire farms on both sides of the road, rather than just the buildings and structures fronting directly on the road.

PHASING SURVEYS

For some surveys, the large size of the survey area, the number of properties to be surveyed, or a level of funding inadequate to accomplish the entire task in one campaign may suggest phasing the survey over two or more years. Developing a phased approach to surveying a community should be part of the initial survey planning. Logical areas should be defined and priorities for their survey should be established. In general, areas where potentially historic properties are the most threatened — such as areas undergoing development and declining neighborhoods — should be targeted first, and more stable areas scheduled for survey later on.

In some surveys it makes sense to approach the overall survey area thematically if the result will not be too fragmented. Thus, the community's residential areas might be surveyed first, with its commercial areas, industrial properties, and parks and cemeteries being surveyed later. This method works best in communities that have developed in fairly clear zones of housing, commerce, industry, etc.

WHAT TO SURVEY

A fundamental issue in planning for an above-ground survey is determining what properties to document. This determination should be guided by the purpose for which the survey is being carried out tempered by the need to complete the project within a defined, limited budget. Those planning the survey should take into consideration the size of the overall area to be surveyed. Is it an entire village or city? Is it a large area or a relatively small area, such as a potential historic district? The types, extent, and concentration of apparent potentially historic properties should be considered. These factors will suggest where and on what to focus survey activities in order to obtain the most information within the available budget. The two standard approaches to surveying historic above-

ground properties are:

- *to survey everything, regardless of age, within the survey boundaries; and*
- *to survey everything over forty years old within the survey boundaries*

Surveying everything within the survey boundaries is the ideal approach for all survey areas regardless of size, but this may be impractical because of cost. Municipal governments and other funding agencies will question the value of surveying concentrations of modern properties around the community's edges unless the survey is to be used for other purposes, such as property assessments, as well. Surveying everything is most appropriate for small-scale surveys of several hundred or fewer properties in areas containing a concentration of "older" properties forty or more years old.

Surveying only the properties forty years old and older is appropriate in certain circumstances, as noted below. The reason for using forty years as the age criterion rather than fifty, the minimum age requirement for national register designation, is that forty years will help ensure that the survey results remain valid for at least ten years. After that, the survey may need to be updated.

Survey projects will often require using different approaches in different areas. The following are recommended approaches for different types of survey areas:

- ***Urban Areas.*** Some portions of urban areas may contain blocks, neighborhoods, or other large or small concentrations of more than forty-year old properties, while other areas contain only scattered properties of that age. *All* properties should be surveyed in those parts of urban areas containing concentrations of forty-year-old and older properties. For areas containing only scattered properties forty-years-old and older, surveying only the forty-plus-year-old properties would be an appropriate technique.
- ***Potential Historic Districts.*** Surveying everything regardless of age is *essential* within potential historic district areas. Nomination materials for a national register district will require an inventory of all buildings, sites, structures, and objects in the district whether or not they make any historical contribution to the district. Historic district study committee reports for the establishment of local districts under Michigan Public Act 169 of 1970, as amended, should contain the same level of information on contributing (historic) and non-contributing (non-historic) properties both to serve the historic district commission's ongoing need for information about each property under its jurisdiction and because of the ever-present possibility of legal challenges. A complete survey is the only way to obtain this information for the report.
- ***Rural Areas.*** Rural areas sometimes contain small hamlets and crossroads settlements containing concentrations of forty-year-old and older properties. *All* properties in such settlements, regardless of age, should be surveyed. In general, other rural properties should be surveyed only when they are forty or more years old. An exception is a potential rural historic district containing a concentration of farms that together appear to possess significance in terms of agricultural, ethnic, architectural, or other history. Within the broad boundaries of such areas, all properties, regardless of age, should be surveyed.
- ***Suburban Areas Developed Since World War II.*** Suburban neighborhoods and subdivisions developed during the 1940s and 1950s merit the same attention given older properties. What to survey can be determined on a neighborhood or subdivision basis. In neighborhoods or subdivisions in which most properties are forty or more years old, *all* properties, regardless of age, should be surveyed. In neighborhoods and subdivisions that were platted more than forty years ago but where little development took place before the early 1960s, surveying just the individual forty-plus-year-old properties may be sufficient.

In all survey projects, the areas in which all properties will be surveyed should be clearly defined at the beginning of the project, if not in the planning stages, in order to avoid any potential disagreements at the conclusion of the project concerning the scope of work to be accomplished.

Surveying Properties Which Have Lost Substantial Integrity

The cost of survey work may be somewhat reduced by not surveying forty-plus-year-old properties that have lost much of their historic character. The national register criteria and local criteria based on them require properties not only to possess historical significance but also to retain a strong measure of their historic appearance and character, a quality the register terms *integrity*. The argument for omitting these properties is that they, by definition, will not meet the requirements for historic designation and may not even be viewed as contributing to a district's historic character.

In fact, omitting these properties from the survey is more often than not false economy. These properties help establish the overall context, in terms of property type, form and style, and historical associations, within which the surveyed properties are evaluated. In the case of potential historic districts, omitting properties that lack integrity will leave an incomplete database which, in the case of national register districting, will have to be made complete before the national register designation can be obtained and, in the event of local districting, will frustrate the local historic district commission every time it has a project involving one of the properties that was not surveyed. A final major pitfall of this approach is that some properties that are historically very important and worthy of preservation efforts by the community may be missed because they *appear* to lack integrity.

Surveying Deteriorated Properties

Properties that have been abandoned or suffer from inadequate maintenance are present in virtually every survey area. Often it is the oldest and sometimes the most historically significant properties that have been abandoned or neglected because the cost of maintaining them is thought to be more than they are worth from an economic standpoint. These properties often actually retain a *higher* level of integrity than properties that have been regularly maintained because routine maintenance tends to encompass alterations as well as repairs. Condition should not play a role in determining whether or not a property should be surveyed. No property should be excluded from a survey because it is in a poor state of repair.

BROAD TYPES OF HISTORIC PROPERTIES

It should be a goal of the survey project to document the full range of types of historically significant properties present in the survey area. Historic resources come in many forms — some of them not so obvious. The national register recognizes five general types of historic properties — buildings, sites, structures, objects, and districts — all of which will be present in nearly all survey areas. National Register Bulletins 16A and 24 define these broad types as follows:

Building: A *building*, such as a house, barn, church, hotel, or similar construction is created to shelter any form of human activity. *Building* may also refer to a historically and functionally related unit, such as a courthouse and jail or a house and barn. Examples include stables, sheds, garages, courthouses, city halls, social halls, commercial buildings, libraries, factories, mills, train depots, stationary mobile homes, theaters, schools, and stores.

Site: A *site* is the location of a significant event, a prehistoric or historic occupation or activity, or a building or structure, whether standing, ruined, or vanished, where the location itself possesses historic, cultural, or archaeological value regardless of the value of any existing structure. Examples commonly encountered in above-ground surveys include estate and other grounds, gardens, ruins of historic buildings and structures, cemeteries, parks, and designed landscapes.

Structure: The term *structure* is used to distinguish from buildings those functional constructions made usually for purposes other than creating shelter. Examples include bridges, tunnels, dredges, fire towers, canals, dams, power plants, water purification and sewage treatment plants, water towers, corncribs, silos, roadways, windmills, grain elevators, kilns, railroad grades, systems of roadways and paths, boats and ships, railroad locomotives and cars, carousels, bandstands, gazebos, and aircraft.

Object: The term *object* is used to distinguish from buildings and structures those constructions that are primarily artistic in nature or are relatively small in scale and simply constructed. Although it may be, by nature or design, movable, an object is associated with a specific setting or environment, such as statuary in a designed landscape. Examples include sculpture and statuary, monuments, fountains, fences and streetlights.

District: A *district* possesses a significant concentration, linkage, or continuity of sites, buildings, structures, or objects united historically or aesthetically by plan or physical development. Examples include college campuses, central business districts or other commercial areas, residential areas, industrial complexes, civic centers, rural villages, large farms, ranches, or estates, and large landscaped parks.

For more information on these terms, see National Register Bulletin 24, *Guidelines for Local Surveys: A Basis for Preservation Planning* (page 1), and National Register Bulletin 16A, *How to Complete the National Register Registration Form* (page 15), both available from the SHPO.

COMPLEX PROPERTIES

Many historic resources such as parks, cemeteries, farms, mill and factory complexes, and, sometimes, residential properties are complex properties that contain a variety of individual historic features. For example, the property associated with a house may also contain a fountain, ornamental fencing, a birdbath, and outdoor fireplace that are also historic features of the property. In an **intensive level survey**, the property as a whole *and* each of its historic features should be surveyed. At the **reconnaissance level**, it may be appropriate to survey the entire property and the *key* historic features *only* rather than each and every historic element of the property. If the property is later scheduled for intensive level survey, the remaining historic features should then be surveyed.

The following property types commonly require this additional level of attention:

Houses and Grounds: Often even relatively small residential properties contain subsidiary buildings such as garages, carriage house/stable buildings, and chicken houses, as well as other features such as ornamental fencing or outdoor fireplaces. The planning for a survey should include establishing standard parameters for which of these subsidiary features to survey and under what circumstances. Ideally a survey will record all of these features — the survey certainly should if the data will be used for a local historic district where work involving all such features will be subject to review — but the survey strategy should make sense from the standpoint of value for money spent. Surveying a great number of modern garages may be pointless except when the survey is to be used for a local historic district. For surveys other than for local historic districts, surveying forty-or-more-year-old garages may make sense, and surveying unusual garages — for example, ones that match the style and finishes of the houses with which they are associated — is important. Old carriage house/stable buildings should always be recorded. For complex properties containing a number of forty-or-more-year-old features, all features, regardless of age, should be surveyed.

Matching house and garage, Highland Park: Both merit survey

Estates: Larger residential properties with landscaped grounds may contain a great number and variety of historic features, including buildings, gardens, sculpture, fountains, swimming pools, ornamental walls and fencing, gates, gazebos, and more. All such properties meeting the survey's age requirements should be surveyed and the individual features should also be surveyed.

Farms: A farm commonly consists of a farmstead area containing houses, barns, and other outbuildings plus the remainder of the farm property, which may include a combination of features such as crop and pasture areas, woodlots, and orchards and gardens. Additional buildings such as a hay barn or cluster of worker housing may stand outside of the main farmstead area. Other elements such as fencing and vegetation may also be important to an understanding of the property.

A survey of a farm property should attempt to provide information on the entire property, including a comparison of the current and historic patterns of land use and physical layout as far as it can be determined, and provide information on all the buildings, structures, and other component features. The list of property types associated with agriculture (see Appendix B, Ruskin Term Lists) will be useful as a guide to the kinds of features that should be surveyed to thoroughly document the farm property. If a farm is included in the survey, *all* of its features, regardless of age, should be surveyed.

Governmental Complexes: All governmental complexes meeting the survey's age requirements should be surveyed. Many governmental complexes are comprised not only of an original building, but also of subsequently built wings and additional buildings. The grounds associated with many of these buildings also contain monuments, flagpoles, and other features. If the governmental complex as a whole meets the survey's age requirements, all features associated with it should be surveyed.

Churches: All church buildings meeting the survey's age requirements should be surveyed. Churches rarely stand alone. Almost always they form complexes that contain such diverse elements as educational buildings or other additions to the main church building, parsonages or rectories, church schools, teachers' residences, and cemeteries. The whole may be fronted by ornamental fencing or a gate. All of the various components of such church complexes should be surveyed.

Cemeteries: All cemeteries within the survey area meeting the survey's age requirements should be included. Ornamental walls or fencing, gates, office buildings, sextons' quarters, any family and public mausolea, grottos and calvary depictions, war memorials, and monuments and memorials of unusual design or special artistic character should also be surveyed individually.

Parks: All parks within the survey area meeting the survey's age requirements should be surveyed. Ornamental walls or fencing, gates, office or other buildings, monuments, ornamental pools and fountains or other historic landscape features, such as gardens and plantings that are part of a landscape plan, gazebos, playground areas, swimming pool complexes, stadia and other sports facilities, and all other man-made features should be surveyed.

Factory and Mill Complexes: All such complexes that meet the survey's age requirements should be surveyed. Individual buildings plus related structures such as dams, power canals or flume systems, powerhouses (or remains of them), water towers, and important landscape features should be surveyed individually.

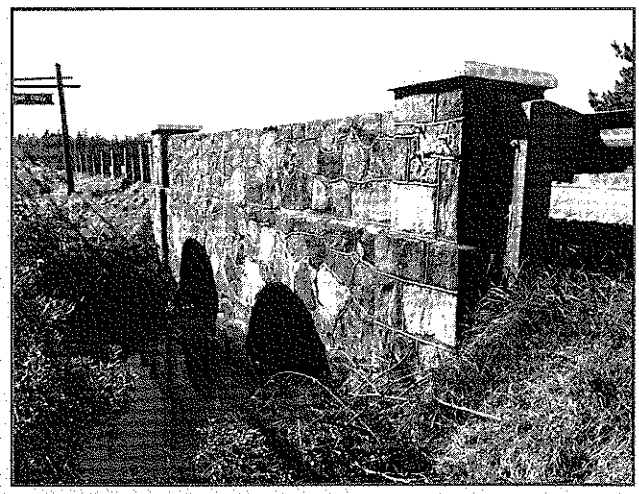
Utilities: This includes such facilities as water purification and sewage treatment plants, pumping stations, and systems; hydro-electric and other electrical-generating plants and substations; and steam-heating plants and systems. Each entire facility that meets the survey's age requirements overall should be surveyed and each component building, structure, and other feature, regardless of age, should be surveyed. The survey should include any historic landscape features present.

WHAT ABOUT?

During your survey you will inevitably have questions about what features should or should not be surveyed. Here are a few examples:

Road and Walkway Infrastructure: Intact, well preserved examples of streets or sidewalks surfaced in materials not commonly seen today, such as streets or sidewalks built of paving brick, and old examples of public staircases, such as those that connect segments of a street separated by a steep slope, should be surveyed. Old retaining walls or structures built of stone, concrete cribwork, or other obsolete materials should be surveyed. Surveyors should be on the lookout for surviving elements of old infrastructure such as stone curbings, old street lighting standards, horse watering troughs, mounting blocks, and hitching posts. Care should be taken to survey unusual structures. Ordinarily modern roads and streets, sidewalks and pathways, staircases, and retaining walls or structures do not merit inclusion in a survey.

Bridges: While many if not most of Michigan's older public highway bridges have been surveyed in statewide highway bridge surveys, some local highway bridges, particularly ones no longer in highway use, may have been missed. The SHPO can provide a list of previously surveyed bridges within the survey area. Older or unusual highway culverts such as fieldstone, brick, or concrete arch structures should be surveyed. Older pedestrian bridges such as structures in parks or connecting schools with playing fields or surrounding neighborhoods should be surveyed. Comparatively few railroad-related structures have been included in past survey efforts. Older railroad bridges, including any stone and concrete-arch culverts, should always be surveyed.



Highway Culvert, Keweenaw County

Trees, Boulders, and Other Natural Features: Ordinarily individual trees, groves of trees, boulders, or other natural features should not be surveyed. However, when they are directly associated with historic events — not merely planted or placed at the site to commemorate them — they should always be surveyed. Examples of historic trees include treaty trees; the witness trees the original surveyors of Michigan used to describe corners of sections or quarter-sections; and trees associated with specific persons or events, such as the Curwood Tree in Owosso under which James Oliver Curwood worked on many of his stories. Examples of boulders include ones associated with treaty signing sites, such as White Rock in Sanilac County, and Big Rock, in Montmorency County, a local landmark after which a nearby hamlet was named.

Mobile-Home Parks/Manufactured Housing Developments: Forty-plus-year-old mobile-home/manufactured housing developments may possess significance in terms of landscape design, social history, and architecture. Developments established forty and more years ago that retain their original layout and a substantial number of mobile/manufactured homes apparently dating from their early years should be surveyed. The survey should gather information on the development's layout and early history. Housing and other buildings and features dating from the development's early years should be surveyed. In parks where the majority of homes date from the development's early years, it may be appropriate to survey all homes regardless of age.

WHAT LEVEL OF RESEARCH?

A fundamental issue to be resolved in planning surveys is the level of historical research that will be required. The level of effort devoted to property-specific historical research is the primary difference between a **reconnaissance level survey** and an **intensive level survey**.

In a **reconnaissance level survey**, the historical information that will be collected about individual surveyed properties will generally be only that which is readily available from looking at the property itself and from published sources and information provided by owners and other informants encountered during the field survey. A reconnaissance level survey provides a preliminary look at an area's historic resources, which makes it possible to focus intensive level survey efforts on the most worthy resources. Thus a reconnaissance level survey of a larger area may serve as a preliminary step to an intensive level survey of a much smaller number of resources. A reconnaissance level survey should *never* be seen as more than the first step in a more comprehensive survey program.

An **intensive level survey** requires historical research on each of the surveyed properties. For *all* surveyed properties, basic sources of information, in addition to those generally used for reconnaissance level surveys, will be used. For those properties that appear to possess a high level of historic importance for the survey area, a higher level of research effort, including research in such sources as tax records, land records, and newspapers, may be required. This level of research will be required in order to provide the historical background on individual properties necessary for making evaluations of eligibility for the National Register of Historic Places or other forms of historic designation. Every survey program should include an intensive level, property-specific research component.

Beginning the survey project with a reconnaissance level survey of the entire survey area and following it up with an intensive level survey of those areas and individual properties that appear to merit the additional research is an efficient and cost-effective approach to obtaining the types of property-specific historical background data that is essential for informed decision-making concerning historic properties.

STAFFING A SURVEY

The number of personnel involved in a survey is dependent on the size and complexity of the project. Small projects may be done by a single person, while the largest surveys may require an entire team. Often, two people working together are sufficient to complete the job. In surveys being completed by a team of surveyors, one person should serve as project manager and be responsible for successful completion of the survey.

The individual responsible for professional components of the survey should meet the federal professional qualifications for historians and architectural historians, and should be able to demonstrate a substantial degree of familiarity with American and Upper Midwestern history and architectural history. It may be impossible to find one person who meets both qualifications; in that case, the project team should include two people who, together, meet the qualifications. People with specialized expertise in subjects such as engineering and technological history, agricultural history, or landscape design history should also be involved, as needed, to provide an understanding of all resources in the survey area. For the federal professional qualifications for historian and architectural historian, as specified in the *Secretary of the Interior's Guidelines for Historic Preservation Projects*, see Appendix D of this manual.

Placing the survey project under the direction of a project manager with adequate expertise and professional and organizational skills is key to the successful completion of the survey project. Thus the project manager should be selected with care whether that person is a professional consultant or a local volunteer. The person should be selected on the basis not only of appropriate historical and architectural history expertise as defined above but also of solid experience in surveying above-ground historic resources. Good historical research and writing skills are important. Samples of historical

written materials based on historical research should be sought from project manager candidates and reviewed for both content and presentation. Candidates should also be evaluated for their abilities to organize and manage the project through to a successful completion within the available time frame. People skills are a valuable commodity in working with team members, any volunteers, property owners, public officials, and members of the public.

Contracting for Surveys

A few communities will find themselves in the fortunate position of having persons with the requisite background, experience, and management skills take on their surveys as volunteer projects, but most will need to contract for some or all of the work. The SHPO maintains a list of consultants interested in survey work who meet the basic federal qualifications for historian and/or architectural historian; it is updated frequently and will be provided upon request. This list should not be considered all-inclusive; there may be other consultants in your area who are not listed. It must also be emphasized that inclusion in the list is not a guarantee of high-quality work, and credentials and experience should be reviewed and references consulted.

Survey sponsors seeking consultants for survey work should develop a Request for Proposals (RFP) for the project. A clear RFP, with work and work products explicitly stated, helps consultants prepare more accurate budgets. If the work program is vague, consultants may have to compensate by pricing for unknown or unclear aspects of the work, and disagreement over the expected products may result at the end of the project. It is a good idea to request the SHPO's survey or national register coordinator to review the RFP before it is sent out to consultants.

The RFP should define the work program and products as fully as possible. It should clearly and thoroughly define:

- The work the consultant is expected to perform;
- The products — including the number of copies — to be provided at the end of the project;
- The boundaries of the survey area, clearly defined in writing and illustrated by a map or series of maps;
- The expectations for the level of property-specific research, including what sources of information the consultant will be expected to use for *all* properties, and what additional research will be required for a specific number of apparently more significant properties, if that information is available;
- The total number of properties to be surveyed and a breakdown of the numbers by level of research, if possible;
- The time frame within which the project must be completed;
- Services or materials that may be provided to the consultant at the consultant's request; and
- Expectations for meetings the consultant will be expected to attend or presentations the consultant will be expected to make.

The RFP should clearly define the information that consultants must submit in their proposals, including:

- A thorough description of the work to be performed and the final products to indicate whether or not consultants have a clear understanding of what will be required;
- A plan of action for accomplishing the work. This should include a breakdown of the work by components and personnel and a schedule with time frames for each component;
- Educational background and related work experience of the personnel who will be assigned to the project; and
- Writing samples for personnel involved in preparing the report.

Finally, the RFP should specifically list the criteria against which proposals will be evaluated. The criteria should award points or credit to proposals that demonstrate:

- A solid understanding of the work and products required;
- An adequate program and realistic time frames for successful completion of the project; and

- Personnel with the necessary educational background and work experience.

Cost is obviously an important consideration, but no proposal should be considered unless it fully meets the evaluation criteria set forth above.

See Appendix E for sample Work Program and Products sections for RFPs.

Using Volunteers

Some survey projects have been carried out entirely as volunteer projects, and volunteers can certainly assist in specific tasks such as the field survey work and property-specific research. Using volunteers in contracted survey projects, however, should be done with caution and a clear knowledge of the dedication of the volunteers. The SHPO's experience has been that volunteers are sometimes not sufficiently motivated to carry out assigned tasks within defined deadlines.

Advisory Board

An advisory board, comprised of local historians, planners, members of any local historic district commission, and interested citizens, can be an asset in a survey. The board can suggest resources for research, people to interview, and collections of information — in general, provide helpful information. A valuable role of the board is to be an emissary of good will during the survey and an advocate for its use after it is complete.

SURVEY PUBLICITY

Surveys can, and should, generate a spark of public interest that can translate into new or renewed interest in the community's history and cultural resources. For that to happen, a program of publicity and outreach needs to be a part of every survey project. The community needs to know what will be surveyed and where, when the survey will begin and end, survey procedures, and the benefits of the survey. At a minimum, two public meetings should be held during the course of the survey, one at the beginning of the project and another near the end, but at a point where eligibility and other recommendations can be presented to the public at the preliminary stage.

Public education and outreach should be components of the survey project. These efforts might include workshops, the publication of brochures, special programs such as poster contests, or the preparation of curriculum materials. Such activities become vehicles for piquing the interest of the media and community organizations, which have the potential to become partners and advocates. The regular issue of press releases can keep the survey on the front burner. A well-informed public that knows where to offer information can be an asset in the research phase of the project. Awareness of the survey while it is being completed can translate into genuine preservation efforts and educational activities. Specific outreach, publicity, and public education tasks and who will be responsible for them need to be clearly defined at the beginning of the project.

STRATEGIES TO ASSURE SAFE AND LEGAL SURVEYS

The following procedures should be followed by every participant in the survey to assure good public relations and personal safety:

- Surveyors should notify the local police or sheriff's department, preferably in writing and at the outset of work, to let them know approximate dates and areas of survey activity.
- Surveyors should not step onto private property unless property owners agree and, preferably, are present.
- All photographs should be taken from the public rights-of-way, unless owners provide permission to enter the property.
- Surveyors should work in pairs for security.
- Suspicious or aggressive activity, such as people following or harassing surveyors, should be reported to law enforcement agents. If threatened, surveyors should leave the area. If challenged to not survey a property, they should pass it by. They can try to come back when the owner is not present, if the survey sponsors insist on the property being surveyed.

In planning a survey project, a process for thorough review of the survey materials at several points in the process should be established and adequate time frames for it allotted. A first review should take place when printouts of the inventory forms, mapping, and the historical overview have been completed. A second review should take place when the survey products are considered complete by the survey team. A final review should take place if problems are discovered at the time of the second review. At each review, the materials should be reviewed not only for completeness and accuracy but also for format and style. As part of the second review, eligibility and other recommendations should be reviewed so that, if possible, they can in the final version of the report reflect a consensus of opinion on the part of the report authors and members of the community. Knowledgeable local historians; members of the historical society, historical commission, or historic district commission; representatives of the local government such as planning staff members; and SHPO staff should all be invited to participate in review of the survey report and other products. For the reviews, all textual material should be polished and free from typos so that reviewers are able to concentrate on the content and not on editing issues. Three to four weeks should be allowed for each review.